

Message Text

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ACTION AGR-08

INFO OCT-01 EUR-12 ISO-00 SWF-01 AID-05 CEA-01 CIAE-00

COME-00 EB-06 FRB-01 INR-07 NSAE-00 RSC-01 CIEP-02

SP-02 STR-04 TRSE-00 LAB-03 SIL-01 SAM-01 OMB-01 /057 W
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FM AMEMBASSY THE HAGUE

TO /SECSTATE WASHDC 4612

INFO AMEMBASSY BONN

AMEMBASSY BRUSSELS

USMISSION EC BRUSSELS

AMEMBASSY COPENHAGEN

AMEMBASSY DUBLIN

AMEMBASSY LONDON

AMEMBASSY PARIS

AMEMBASSY ROME

UNCLAS THE HAGUE 5223

PASS AGRICULTURE

E.O. 11652: N/A

TAGS: EAGR, ETRD, EEC

SUBJECT: PROJECTED SUPPLY AND DEMAND FOR WHEAT AND FEED GRAINS IN

EEC FOR 1974/75

REF: BRUSSELS 8188, FASTO CIRC 412

DUTCH MINAG SOURCE SUPPLIED US WITH LATEST 1974/75 SEASON
WHEAT AND FEED GRAIN PROJECTIONS FROM EC COMMISSION. THESE FIGURES
ARE COMPARED WITH THE PRELIMINARY 1973/74 DATA WHICH IS BETWEEN
BRACKETS (ALL FIGURES IN MILLION M.T.):

1. WHEAT:

A. BEGINNING STOCKS, 5.7 (4.4); PRODUCTION, 40.6 (38.2);
IMPORTS, 3.8 (4.0) (NOTE: A NINE-COUNTRY SURVEY PROJECTED IMPORTS
OF 4.2 MILLION M.T.); ON FARM RETENTION, 7.3 (7.6); FEED USAGE,
8.0 (6.5); FOOD AND OTHER INDUSTRIAL USE, 22.7 (22.1); EXPORTS,
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8.0 (5.4); ENDING STOCKS, 4.3 (5.0). THERE ARE SEVERAL INCONSIST-

ENCIES IN THE ABOVE FIGURES, E.G: (1) 1974/75 BEGINNING STOCKS OF 5.7 MILLION ARE 700,000 T.T. HIGHER THAN PRELIMINARY ENDING STOCKS FOR 1973/74 OF 5.0 MILLION. OUR SOURCE HAS NO EXPLANATION FOR THIS THOUGH INTERVENTION "B" MAY BE THE ANSWER. (2) ENDING STOCKS IN 1974/75 ARE 200,000 M.T. TOO HIGH ON THE BASIS OF THE ABOVE FIGURES. THIS MAY INDICATE POSSIBLY HIGHER IMPORTS (TO 4.0 MILLION).

B. A BREAKDOWN OF PROJECTED 1974/75 WHEAT AND FLOUR EXPORTS IS AS FOLLOWS (ALL IN MILLION MT.T): FOOD AID, 1.5; COMMERCIAL FLOUR EXPORTS, 3.0; AID TO INDIA, 1.0; AND COMMERCIAL EXPORT CERTIFICATES BOOKED THUS FAR, 1.5. THIS TOTALS 7.0 MILLION M.T. OTHER EC AND DUTCH SOURCES CONFIRM THAT BETWEEN 7.0 AND 7.5 MILLION M.T. OF THE 1974/75 EC WHEAT SUPPLY IS ALREADY COMMITTED FOR EXPORT. WITH PROJECTED EXPORTS PLACED AT 8.0 MILLION M.T., THE EC STILL HAS BETWEEN 0.5 AND 1.0 MILLION M.T. OF WHEAT UNCOMMITTED.

2. FEED GRAINS: (ONLY BARLEY AND CORN, RESPECTIVELY):

A. BEGINNING STOCKS, 1.6 AND 2.7 (1.6 AND 2.6); PROCUREMENT, 33.8 AND 14.6 (34.1 AND 16.1); IMPORTS, 1.7 AND 8.8 (1.5 AND 11.4) (NOTE: NINE-COUNTRY SURVEY INDICATED PROJECTED IMPORTS OF 11.2 MILLION.); ON FARM RETENTION, 15.5 AND 3.6 (15.1 AND 4.2); FEED USAGE, 11.2 AND 15.3 (11.4 AND 17.9); EXPORTS, 1.1 AND 0.7 (1.7 AND 0.7); AND ENDING STOCKS, 1.3 AND 2.4 (1.7 AND 2.5).

B. ALSO HERE, THERE ARE SEVERAL MINOR INCONSISTENCIES IN THE CARRY OVER STOCKS. NEITHER WE NOR OUR GOVERNMENT CONTACT CAN EXPLAIN THIS. MORE SEVERE INCONSISTENCIES ARE:
(1) TOTAL PROJECTED BARLEY DISTRIBUTION IS ABOUT 200,000 M.T. TOO LOW, WHICH MAY DISAPPEAR IN CARRYOVER STOCKS, AND
(2) TOTAL PROJECTED CORN DISTRIBUTION IS 700,000 M.T. TOO HIGH. MINAG SOURCE BELIEVES THAT THIS INCONSISTENCY WILL LARGELY (IF NOT ALL) BE ELIMINATED BY LOWER THAN PROJECTED EXPORTS OF CORN.

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